13 September, 2013

Tourism activity

July 2013

Tourism still growing due to foreign residents

In July 2013, tourism accommodation establishments accounted for 5.3 million overnight stays, which stood for a positive year-on-year change rate of 3.8%, however lower than the one of July 2012 (+8.6%).

Overnight stays from non residents accounted for a 6.0% growth (+10.1% in June 2013), but residents accounted for a decline (-1.3%), contrary to the result from the previous month (+5.3%).

Among the main inbound markets, the emphasis goes to the quite considerable growth of the USA (+24.1%) and the positive contributions of Ireland (+10.5%), Germany (+9.9%), France (+9.9%) and The United Kingdom (+8.7%).

Total revenue accounted for a positive year-on-year change rate of 6.7% and revenue from accommodation increased by 7.3%.

Table 1. Global preliminary results from tourism activity

GLOBAL PRELIMINARY RESULTS	Month		Accumulated	
	Jul 13	Year-on-year change rate (%)	Jan to Jul 13	Year-on-year change rate (%)
Guests (thousand)	1 593.1	3.3	8 001.2	3.5
Overnight stays (thousand)	5 292.3	3.8	22 929.8	4.9
Residents in Portugal	1 564.8	-1.3	6 510.6	-1.9
Non residents	3 727.5	6.0	16 419.2	7.9
Average stay (no. of nights)	3.3	0.0	2.9	0.1
Net bed occupancy rate (%)	56.9	1.4 p.p.	39.1	1.4 p.p.
Total revenue (€ Million)	252.7	6.7	1 054.5	5.1
Revenue from accommodation (€ Million)	186.4	7.3	734.0	6.9
RevPAR (Average revenue per available room) (€)	45.1	5.6	27.8	5.9

Increased number of guests and overnight stays

In July 2013, tourism accommodation activity establishments hosted 1.6 million guests and 5.3 million overnight stays (3.3% more guests and 3.8% more overnight stays than in July 2012). However, these figures reveal a slow down on the trend from the last two months (+11.1% in overnight stays in May and +8.6% in June).

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From January to July 2013, these establishments hosted 8.0 million guests (+3.5%) which in turn originated 22.9 million overnight stays (+4.9%).

In July 2013, among the various typologies, the emphasis went to the *"pousadas"* with an year-on-year increase of 12.9% in the number of overnight stays. Hotels followed (+7.4%), with all the categories contributing positively, more so 5 star hotels (+16.8%). However, it should be noted that the offer from these establishments also increased in a significant way (+11.9% of available beds[1] in 5 star hotels when compared with the same period of 2012).

On the contrary, tourist apartments had slight declines in the number of overnight stays.

The accumulated results of January to July 2013 were mostly positive, especially in tourist villages and tourist apartments (+9.7% and +7.4%, respectively).

Table 2. Overnight stays by type and category of the establishment

Type of establishment and category	Overnight stays (10^3)		Year-on-year change rate
	Jul-12	Jul-13	%
Total	**5 100.0**	**5 292.3**	**3.8**
Hotels	**2 837.9**	**3 048.5**	**7.4**
*****	518.6	605.5	16.8
****	1 410.2	1 493.7	5.9
***	651.3	669.8	2.8
** / *	257.8	279.6	8.5
Apartment hotels	**903.0**	**897.3**	**-0.6**
*****	68.9	66.2	-4.0
****	619.4	609.6	-1.6
*** / **	214.7	221.6	3.2
Pousadas	**42.3**	**47.7**	**12.9**
Tourist apartments	**699.0**	**686.7**	**-1.7**
Tourist villages	**307.5**	**314.6**	**2.3**
Other tourist establishments	**310.3**	**297.3**	**-4.2**

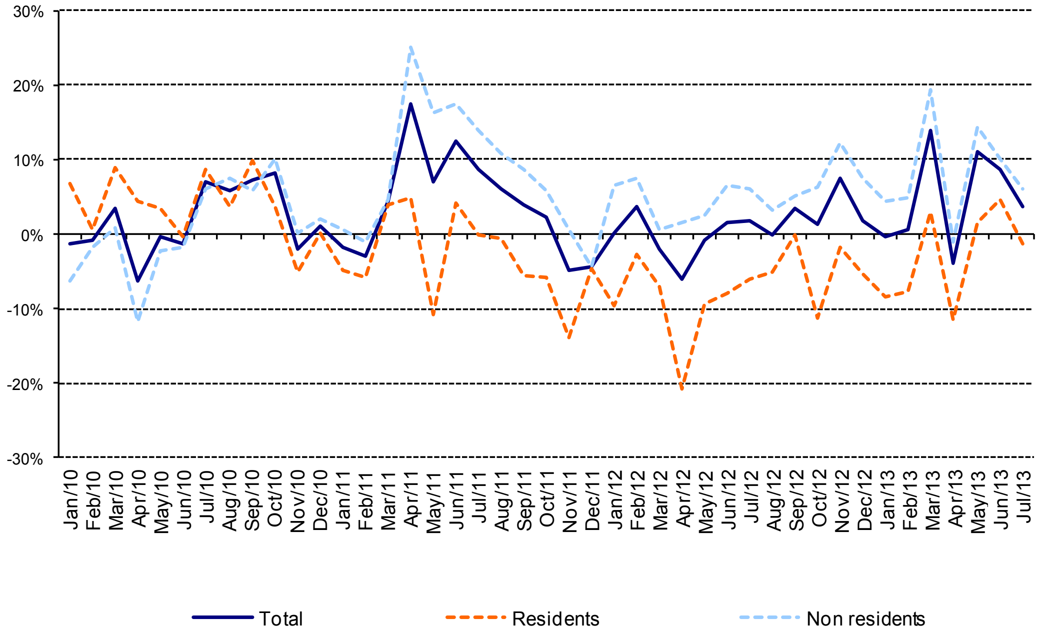
Reduction in overnight stays spent by residents but increase for non residents

Overnight stays spent by residents totalled 1.6 million in July 2013, which stood for 1.3% less than in July 2012. This outcome interrupted the growth seen in the two previous months.

Overnight stays spent by non residents stood at 3.7 million, representing a 6.0% growth in year-on-year terms, less than in the previous month (+10.1% in June 2013), resulting in a +7.9% change rate when analysing the accumulated results of January to July.

[1] Single bed equivalent unit

Figure 1. Overnight stays, month-to-month change rate



With regard to the 10 main inbound markets[2], the British had the highest share in July (22.9%) and stood for a positive year-on-year change rate of 8.7% in overnight stays (68.3 thousand more), yet below the accumulated result from January to July (+10.9%).

Germany (11.1% of overnight stays from non residents in July) and France (7.7%) followed with both recording a 9.9% year-on-year growth in overnight stays.

The Spanish market, representing 12.2% of the total in July, decreased by 1.4% in year-on-year terms; so did the Dutch and the Italian, declining by 5.4% and 5.7%, respectively.

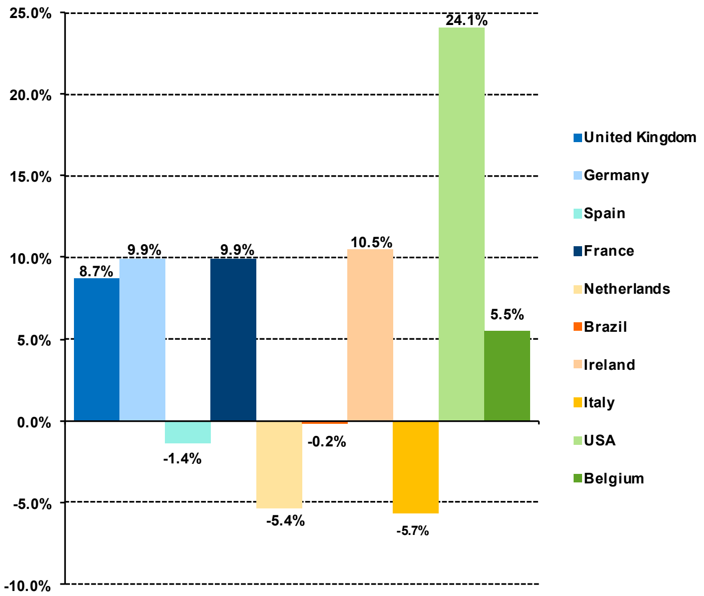
Ireland kept growing considerably (+10.5%), but not as much as in the previous months (+25.9% in June and +41.1% in May).

In July 2013, the USA is noteworthy (2.5% weight in July) particularly when analysing the number of overnight stays, which stood for a significant 24.1% year-on-year increase and also recording a 21.0% growth in terms of the accumulated results of January to July.

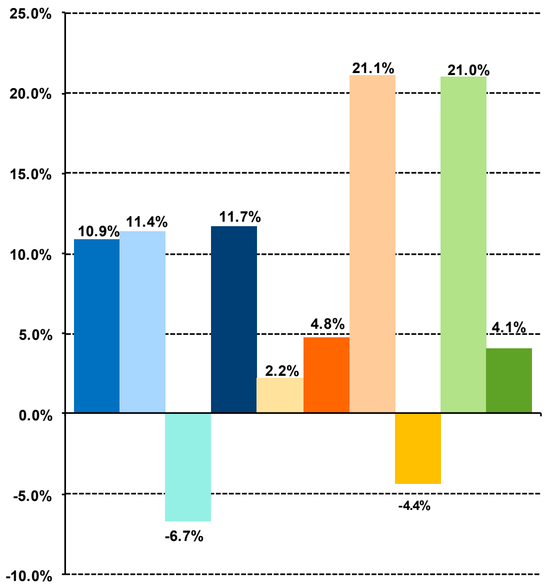
[1] Based on 2012 overnight stays

Figure 2. Overnight stays by main inbound markets (1) – year-on-year change rates

2a. Year-on-year change rate July 2013



2b. Year-on-year change rate January to July 2013



(1) Main inbound markets according to 2012 overnight stays results (in graphs by 2012 descending order)

Among the various regions, the trend in the total of overnight stays was mostly positive when compared with the same period of the previous year. In July 2013, the Azores grew by 16.5%, with the North also growing (+8.4%) and Madeira as well (+7.4%). On the contrary, the Centre and the Alentejo presented declines (-2.2% and -2.1%, respectively).

Keeping the trend of the last two months, the highest increase in overnight stays from residents came from Madeira (17.8% more than in July 2012), quite above the Centre (+2.8%), Alentejo (+2.5%) and the North (+1.7%). In the remaining regions the demand from Portuguese residents declined, more so in the Algarve (-4.2%), yet this region was the main destination for them (41.4% of overnight stays in total), as it is usual in the month of July.

Concerning non residents, overnight stays kept growing in the Azores (+27.5% in July; +27.0% in June), followed by the North (+14.2%) and Lisbon (+9.5%), with the latter holding a 22.7% share of the total overnight stays spent by non residents in July 2013 (21.9% in July 2012).

Madeira (15.1% of the total overnight stays from non residents in July 2013) and Algarve (45.2% share in July 2013 and 46.1% in July 2012) also presented positive results, while Alentejo and the Centre kept a declining trend following the one of the previous month.

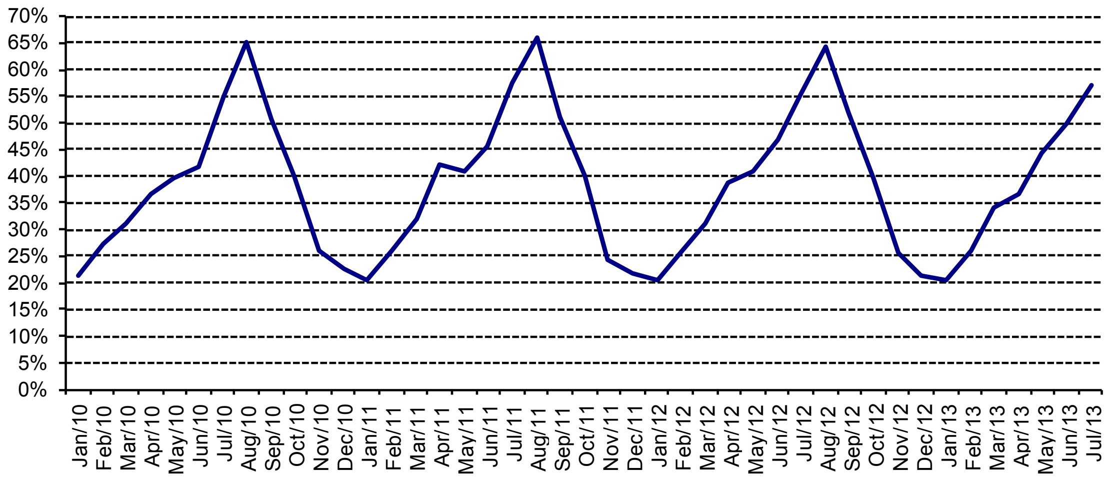
Table 3. Overnight stays by region (NUTS II)

NUTS II	Overnight stays (10^3)				Residents overnight stays (10^3)				Non residents overnight stays (10^3)			
	Jul 13	Year-on-year change rate (%) Jul 13	Jan to Jul 13	Year-on-year change rate (%) Jan-Jul 13	Jul 13	Year-on-year change rate (%) Jul 13	Jan to Jul 13	Year-on-year change rate (%) Jan-Jul 13	Jul 13	Year-on-year change rate (%) Jul 13	Jan to Jul 13	Year-on-year change rate (%) Jan-Jul 13
Portugal	**5 292.3**	**3.8**	**22 929.8**	**4.9**	**1 564.8**	**- 1.3**	**6 510.6**	**-1.9**	**3 727.5**	**6.0**	**16 419.2**	**7.9**
North	517.4	8.4	2 625.4	7.1	225.9	1.7	1 289.1	0.3	291.5	14.2	1 336.3	14.5
Centre	408.8	- 2.2	1 989.7	-1.5	236.4	2.8	1 201.3	-0.4	172.4	- 8.3	788.4	-3.0
Lisbon	1 080.4	5.9	5 553.2	6.1	236.0	- 5.3	1 370.0	-2.1	844.5	9.5	4 183.3	9.0
Alentejo	136.7	- 2.1	602.2	-2.9	92.9	2.5	409.4	-3.8	43.8	- 10.6	192.8	-1.0
Algarve	2 331.4	1.5	8 180.5	4.5	647.4	- 4.2	1 704.8	-3.8	1 684.0	3.9	6 475.7	6.9
Azores	169.9	16.5	579.2	8.4	42.8	- 7.2	211.7	-9.4	127.1	27.5	367.4	22.2
Madeira	647.6	7.4	3 399.7	7.5	83.4	17.8	324.3	3.3	564.2	6.0	3 075.5	8.0

Slightly better net bed occupancy rates

In July 2013, the net bed occupancy rate in tourism accommodation establishments was 56.9%, higher by 1.4 p.p. when compared with the one from July 2012.

Figure 3. Net bed occupancy rate



In July 2013, Madeira and the Algarve had the highest net bed occupancy rates (71.6% and 70.0%, respectively), followed by the Azores (62.8%) and Lisbon (60.7%).

In year-on-year terms, the net bed occupancy rates increased in all regions, with the exception of the Centre (-1.2 p.p.). Azores and Madeira had the highest increases (+7.8 p.p. and +3.9 p.p., respectively).

Table 4. Net bed occupancy rate and average stay, by region

NUTS II	Occupancy rate %		Average stay (No. of nights)	
	Jul-12	Jul-13	Jul-12	Jul-13
Portugal	**55.5**	**56.9**	**3.3**	**3.3**
North	36.8	39.4	1.9	1.9
Centre	32.6	31.4	2.1	2.0
Lisbon	58.9	60.7	2.4	2.5
Alentejo	33.8	34.0	2.0	2.0
Algarve	69.5	70.0	5.2	5.1
Azores	55.0	62.8	3.1	3.4
Madeira	67.7	71.6	5.7	5.8

By type of establishment, the highest values for this indicator came from apartment hotels, in all categories. Five star hotels (64.8%) had noteworthy results as well.

In comparison with July 2012, there were positive evolutions in 3 and 2 star apartment hotels (+7.0 p.p.) and in tourist villages (+3.4 p.p.).

Table 5. Net bed occupancy rate and average stay, by type and category of the establishment

Type of establishment and category	Occupancy rate %		Average stay (No. of nights)	
	Jul-12	Jul-13	Jul-12	Jul-13
Total	**55.5**	**56.9**	**3.3**	**3.3**
Hotels	**55.1**	**56.4**	**2.8**	**2.8**
*****	65.9	64.8	3.3	3.3
****	60.3	62.9	3.1	3.1
***	47.7	47.7	2.4	2.4
** / *	39.3	40.7	1.9	1.9
Apartment hotels	**67.6**	**70.1**	**5.0**	**4.8**
*****	73.2	68.4	5.7	4.8
****	69.6	71.0	5.0	4.9
*** / **	61.1	68.1	4.6	4.4
Pousadas	**40.9**	**39.2**	**1.8**	**2.0**
Tourist apartments	**62.1**	**61.0**	**5.7**	**5.8**
Tourist villages	**57.1**	**60.5**	**5.0**	**6.6**
Other tourist establishments	**33.2**	**34.8**	**2.4**	**2.4**

Unchanged average stay

In July 2013, the average stay was 3.3 nights, the same as in July 2012.

As in previous occasions, the highest average stays came from Madeira (5.8 nights) and Algarve (5.1 nights).

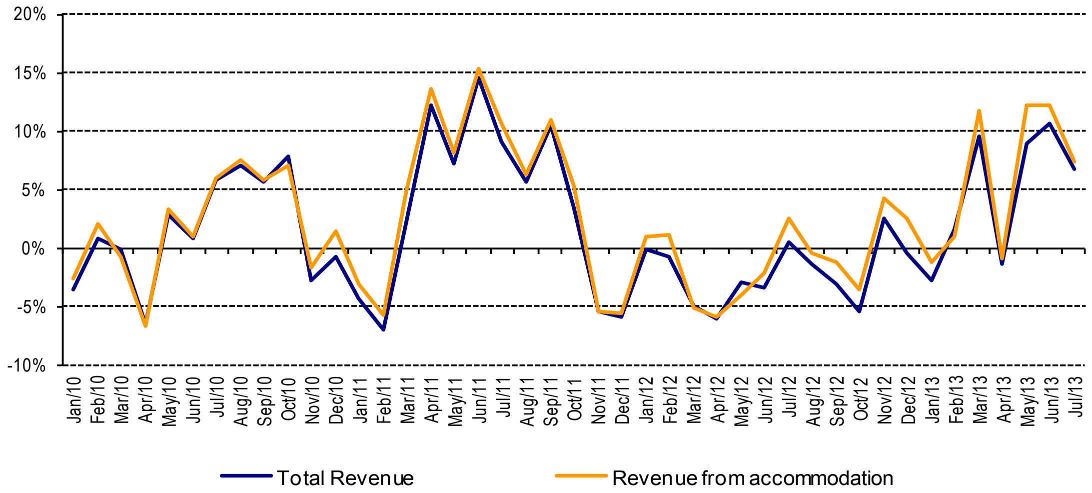
Tourist villages presented an average stay of 6.6 nights, corresponding to the highest year-on-year increase (+1.6 nights). The emphasis also went to tourist apartments (5.8 nights) and apartment hotels (4.8 nights).

Revenue and RevPAR with improved results

Tourist accommodation establishments accounted for EUR 252.7 million in total revenue and EUR 186.4 million in revenue from accommodation. When compared with the same period of the previous year, there was a positive trend (+6.7% in total revenue and +7.3% in revenue from accommodation). However, in comparison to the previous month, there was a slowdown in performance (+10.7% and +12.2%, respectively in June 2013).

The results from July are better than those of the first seven months of the year (+5.1% in total revenue and +6.9% in revenue from accommodation).

Figure 4. Total revenue and total revenue from accommodation - month-to-month change rate



Revenue from establishments in Lisbon, the North and Azores had the best results, underlining the fact that Lisbon had even higher results than those from overnight stays, as in the previous month. As a matter of fact, in this region, the year-on-year increase in revenue benefited from the implementation of promotional prices in July 2012, a month in which the year-on-year change rate was +4.7% in overnight stays and -2.1% in revenue from accommodation.

The Centre and Alentejo presented declines in revenue, more so than those recorded in overnight stays.

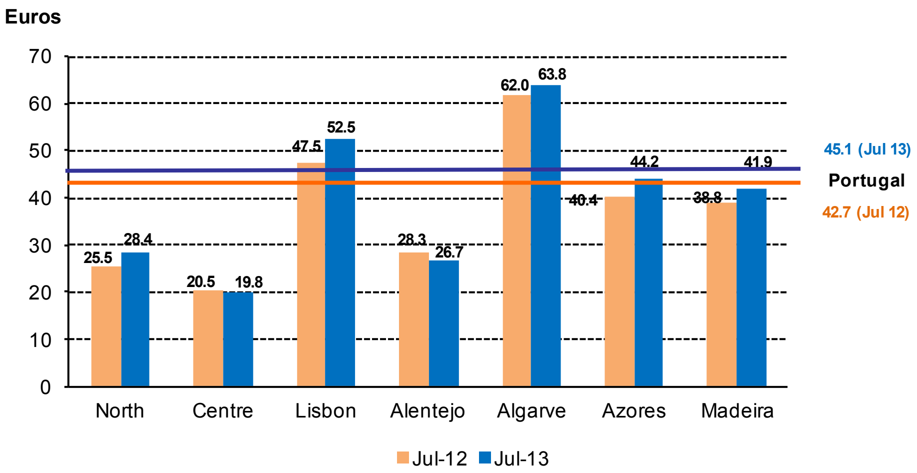
Table 6. Revenue by region (NUTS II)

NUTS II	Total revenue (10^6 euros)		Revenue from accommodation	
	Jul-13	Year-on-year change rate (%)	Jul-13	Year-on-year change rate (%)
Portugal	**252.7**	**6.7**	**186.4**	**7.3**
North	23.4	8.8	17.5	11.8
Centre	17.2	-5.2	12.3	-3.6
Lisbon	58.7	13.2	44.8	15.2
Alentejo	6.7	-6.1	4.8	-7.5
Algarve	110.2	5.1	83.1	4.4
Azores	7.3	11.9	5.7	11.7
Madeira	29.1	8.6	18.2	9.8

In July 2013, RevPAR from tourist accommodation activity was EUR 45.1, higher by 5.6% when compared with July 2012.

The regions of the North and Lisbon had considerable year-on-year increases in RevPAR (+11.4% and +10.5%, respectively), closely followed by Azores and Madeira (+9.4% and +8.0%, respectively).

Figure 5. Average revenue per available room



In July 2013, the highest values in RevPAR were achieved in 5 star hotels (EUR 84.1) and in 5 star apartment hotels (EUR 71.8).

In comparison with the month of June, while in 5 star hotels there was a difference of EUR +6.1 in the RevPAR of July, in 5 star apartment hotels the month of July accounted for a EUR 28.6 increase in RevPAR.

The trend, in year-on-year terms, was mostly positive in the various typologies and categories, more so in 2 and 1 star hotels (+7.8%), in 4 star hotels and in *"pousadas"* (+6.9% in both).

Table 7. Average revenue per available room, by type and category of the establishment

Type of establishment and category	RevPAR (€)		Year-on-year change rate
	Jul-12	Jul-13	%
Total	**42.7**	**45.1**	**5.6**
Hotels	**43.9**	**46.7**	**6.4**
*****	83.8	84.1	0.4
****	45.1	48.2	6.9
***	29.4	29.7	1.0
** / *	21.7	23.4	7.8
Apartment hotels	**53.3**	**56.4**	**5.8**
*****	70.7	71.8	1.6
****	56.0	59.2	5.7
*** / **	41.1	43.8	6.6
Pousadas	**55.0**	**58.8**	**6.9**
Tourist apartments	**41.5**	**41.5**	**0.0**
Tourist villages	**52.1**	**52.0**	**-0.2**
Other tourist establishments	**19.7**	**20.6**	**4.6**

Camping sites and holiday camps

In July 2013, results from the camping sites declined overall when compared with July 2012. The number of campers stood at 313.9 thousand with a corresponding 1.1 million overnight stays. These figures represented year-on-year decreases of 4.8% and 11.0%, respectively.

The reduction in overnight stays, when compared with July 2012, resulted from both residents (-10.5%) and residents abroad (-12.3%), with residents holding a share of 75.1% of the total overnight stays. Results from July 2013, in comparison with the previous month, stood for a trend reversal as far as overnight stays from non residents are concerned (+5.1% year-on-year change rate in June 2013) on a par with a slower pace from residents (-24.0%).

The average stay was 3.3 nights, below the one from July 2012 (3.6 nights).

In the period January to July 2013, the camping sites recorded 2.4 million overnight stays, 17.0% less than in the same period of the previous year.

Holiday camps and youth hostels had declining results in the month of July 2013. The number of guests stood at 51.5 thousand, which stood for a year-on-year decrease of 8.5%. The number of overnight stays totalled 126.7 thousand which also corresponded to a 10.9% decrease in comparison to July 2012.

Overnight stays spent by residents, representing 80.3% of the total, decreased by 11.4%, considerably more than those spent by non residents (-8.8%). The average stay remained unchanged (2.5 nights).

In the period January to July 2013, the number of overnight stays spent in holiday camps and youth hostels decreased by 12.6% when compared with the same period of 2012, with a total of 428.7 thousand.

Table 8. Camping, holiday camps and youth hostels, by origin of the guests, July 2013

	Unit	Camping sites			Holiday Camps and Youth Hostels		
		Total	Residents	Non residents	Total	Residents	Non residents
Campers / Guests	10^3	313.9	223.9	90.0	51.5	39.4	12.2
Overnight stays	10^3	1 050.8	789.4	261.4	126.7	101.8	24.9
Average stay	nights	3.3	3.5	2.9	2.5	2.6	2.0

MAIN INBOUND MARKETS IN 2012

The Dutch market

In 2012, with regard to the total of overnight stays spent by residents abroad in national establishments, 7.8% originated in Dutch residents with The Netherlands ranking 5th in terms of the main inbound markets.

In the last 8 years, the performance of this market was mostly positive. In 2005, the number of overnight stays grew significantly by 12.3%. After growing by 8.1% in 2008, a decrease followed in 2009, after which a recovery period succeeded, consolidated in 2011 (+8.1%) and 2012 (+7.2%).

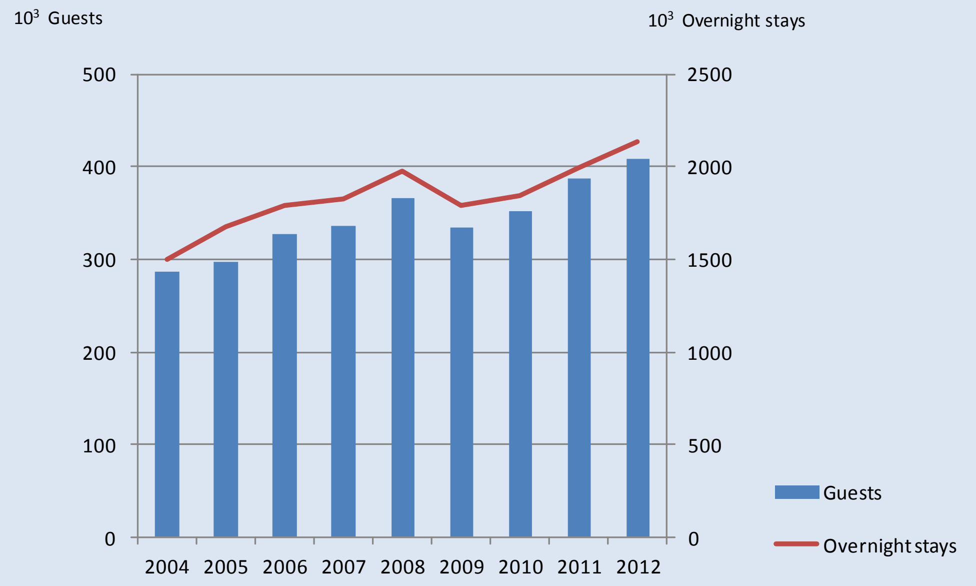
In 2012, tourism accommodation establishments hosted 408.1 thousand Dutch guests which in turn originated 2.1 million overnight stays. When compared with the previous year, the number of guests went up by 5.1% and overnight stays increased by 7.2%. In 2012, the average stay was 5.2 nights.

The Algarve was the main destination for Dutch guests (67.0% of overnight stays), followed by Lisbon (13.3%) and Madeira (10.6%). The average stay was longer in Algarve (7.2 nights) and in Madeira (6.0 nights).

The most sought after establishments were hotels (34.5% of overnight stays from this market), with more than half of those nights spent in 4 star category units (51.2% of overnight stays spent in hotels). Apartment hotels were the second choice (27.6%), followed by tourist apartments (22.3%). The longest average stays came from tourist apartments (7.8 nights), apartment hotels (7.7 nights) and in tourist villages (7.3 nights).

The highest demand occurred in the period June to September with a record of 51.6% of overnight stays from this market.

Evolution of guests and overnight stays from the Dutch market



EXPLANATORY NOTES

Data disseminated in this "Press Release" refers to the following data outputs:

2013 – June and July – preliminary data; January to May – provisional data.

2012 – January to December – final data

Data refers to tourism accommodation establishments in operation, in each reference period.

In between preliminary, provisional and definitive data, results are revised due to definitive answers instead of provisional and mainly due to the replacement of non response estimates by effective responses, including situations of temporary suspended activity not duly reported. The degree of revision, measured by the difference in percentage points from the year-on-year change rates of provisional versus preliminary data is as follows:

	Overnight stays	Revenue from accommodation
Jan to May 13	-1.0	-0.9

Guest – Individual that spends at least one overnight stay in a tourism accommodation activity establishment.

Overnight stay – Time spent by an individual between midday and midday of the following day.

Average stay – Relation between the number of overnight stays and the number of guests that originated those overnight stays during the reference period.

Net bed occupancy rate – corresponds to the relation between the number of overnight stays and the number of available beds, in the reference period, counting as two beds each double bed**.**

Total revenue – revenue from the activity of tourism accommodation establishments: room renting, food and beverage and others related to the activity itself (assignment of spaces, laundry, tobacco, communications, etc.).

Revenue from accommodation – revenue from overnight stays spent by guests in all tourist accommodation establishments.

RevPAR – Revenue per available room, measured by the relation between the revenues from accommodation and the number of available rooms, in the reference period.

Camp sites –A collective, fenced-off facility for tents, caravans, trailers and mobile homes.

Holliday camp – A holiday complex with appropriate facilities for providing free or low-cost holidays, usually as a social service by public or private entities.

Youth hostel – A non-profit establishment providing accommodation for young people or small groups of young people.

Year-on-year change rates – comparison between the variable level in the reference period and the same period of the year before. The calculation of year-on-year change rates for the main indicators is based on values in units, although in this press release they are visible only in thousands.

Rounded figures may imply that totals don't correspond to the sum of the parcels.

ABBREVIATIONS

RevPAR – Revenue per Available Room

Date of next press release: 14 October 2013